



Agent Comms Pg 1



## Advisors Assistant Commission Transmittal Report

Our optional Commissions Module tracks commissions for the agency, agents, and managers. This report is a sample of the first page of an transmittal report which an agency would use to pay agents and/or managers. The agents name and address is designed to show through a window envelope.

The last page of the report shows breakdowns of various totals. This is only one of over 225 reports in Advisors Assistant.

<input checked="" type="checkbox"/> Asset
Allocation 2
Excel Graph 1
Excel Graph 2
Morningstar
Agent Production
Agent Comms Pg 2
Ins Client Detail
Policy Owner

AGENT ASSISTANT  
COMMISSIONS  
EXCEL GRAPH 1  
EXCEL GRAPH 2  
MORNINGSTAR  
AGENT PRODUCTION  
AGENT COMMS PG 2  
INS CLIENT DETAIL  
POLICY OWNER

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Client Marketing Systems  
Agent Transmittal Statement

Statement Date: 10/05/1998

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John Adams  
The Adams Agency  
123 Insurance Blvd  
Primo City, CA 98234-8745

Insured	Policy Number	Commission	Premium	Comm Percent	Case Split%	Due Date	Posted Date	Level	Paid By
The Acme Company	87465-0	11.52 R	288.07	4.00%	100.00	09/01/99	10/02/99	Agent	Agency
J Brown	87456	19.83 R	283.33	7.00%	100.00	09/01/99	10/02/99	Agent	Agency
S Dempsey	PENDING	16.67 R	186.87	10.00%	100.00	09/01/99	10/02/99	Agent	Agency
A Jackson	826448	2.60 R	50.00	5.20%	100.00	09/01/99	10/02/99	Agent	Agency
A Jackson	84336	7.50 R	150.00	5.00%	50.00	09/01/99	10/02/99	Agent	Agency
A Jackson	764189	11.81 R	157.50	7.50%	100.00	09/01/99	10/02/99	Agent	Agency
A Jackson	GM87405	58.33 R	2,918.67	2.00%	100.00	09/01/99	10/02/99	Agent	Agency
J Sample	84353	91.67 F	166.67	55.00%	100.00	09/01/99	10/02/99	Agent	Agency
S Adams	APP-2	21.00 R	280.00	7.50%	100.00	09/02/99	10/02/99	Agent	Agency
J Sample	28452	25.14 R	251.39	10.00%	100.00	09/03/99	10/02/99	Agent	Agency
T Jefferson	2345	10.61 R	235.75	4.50%	100.00	09/04/99	10/02/99	Agent	Agency
L Johnson	88756	20.83 R	250.00	8.33%	100.00	09/05/99	10/02/99	Agent	Agency
J Madison	87456	36.00 R	400.00	9.00%	100.00	09/05/99	10/02/99	Agent	Agency
A Jackson	26346A-NEW	5.63 R	125.00	4.50%	100.00	09/10/99	10/02/99	Agent	Agency
M Jackson	123	3.38 R	800.00	0.38%	100.00	09/12/99	10/02/99	Agent	Agency
J Wasserman	1	1.23 R	20.45	6.01%	100.00	09/12/99	10/02/99	Agent	Agency
S Dempsey	22222	6.06 R	80.78	7.50%	100.00	09/13/99	10/02/99	Agent	Agency
J Madison	84756	0.73 R	14.52	5.03%	100.00	09/15/99	10/02/99	Agent	Agency
T Jefferson	12345	400.25 F	1,275.50	31.38%	100.00	09/18/99	10/02/99	Agent	Agency
J Brown	287384	2.89 R	57.80	5.00%	100.00	09/20/99	10/02/99	Agent	Company
J Madison	78453	8.70 R	129.37	7.50%	100.00	09/20/99	10/02/99	Agent	Agency
S Adams	8475	12.23 R	168.00	7.37%	100.00	09/23/99	10/02/99	Agent	Agency
J Brown	1	42.00 R	420.00	10.00%	100.00	09/23/99	10/02/99	Agent	Agency
M Jefferson	87504	10.00 R	100.00	10.00%	100.00	09/23/99	10/02/99	Agent	Agency
J Sample	478453	13.13 R	175.00	7.50%	100.00	09/28/99	10/02/99	Agent	Agency
T Jefferson	87465	9.46 R	120.15	7.50%	100.00	09/27/99	10/02/99	Agent	Agency
H Funtbouser, LUTC	PENDING	2.54 R	84.78	3.00%	100.00	09/01/99	10/02/99	Agent	Agency
The Acme Company	65458784	15.71 R	785.50	2.00%	100.00	09/01/99	10/02/99	Agent	Agency
The Acme Company	GB47853	1,200.00 R	10,000.00	12.00%	100.00	09/02/99	10/02/99	Agent	Agency
T Jefferson	2847853	7.00 R	78.00	0.00%	100.00	10/03/99	10/03/99	Agent	Agency

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